

Work tracker

Get a live overview of all active works, their status, timelines, and key milestones.

- [Track work progress](#)
- [Work details](#)

Track work progress

The **Track Work Progress** feature allows users to **record and monitor the real-world progress** of maintenance tasks.

It helps ensure that all approved work is properly tracked — from planning through completion.

Where to find it

This feature is available under the “**Tasks & Costs**” section, in the “[Work Tracker \(Actuals\)](#)” view.

“  **Tip:** The Work Tracker is only available for **approved years**. If you haven't approved a year yet, you'll need to **approve at least one budget year** before accessing this feature.

Purpose

The Work Tracker is designed to log **actual activities and outcomes** for tasks that have already been approved in the maintenance plan.

It provides a transparent record of what work has been completed, deferred, or cancelled.

Watch the demo

To see how the **Work Tracker** works in practice, watch the short demo video below.

It walks you through updating task statuses, adding completion details, and uploading supporting documents.

<https://www.youtube.com/embed/xGGotirgIKg>

How it works

Each task in the **Work Tracker** table includes a contextual menu.

Click the **three dots icon**  on any task cell to open the available **status actions**.

Draft

Foam fire suppression system servicing

External

Landscape services

Pool and spa cleaning

-

\$1,653.75

Draft

Pool and spa inspection

Pool and spa replacement

-

Total

Inflation

5.00%

Contingency (3.00%)

\$169

Total expenses

\$5,814

\$---

\$---

\$

Work details

View details

Add note

View all notes

Work progress

-

Not started

Schedule work

Start work

Complete work

Cancel work

Defer work

Available actions

- **Not Started** – No action has been taken yet.
- **Schedule Work** – Work has been scheduled; start and contractor details can be added later.
- **Start Work** – The task is in progress.
- **Complete Work** – The task has been completed.
- **Cancel Work** – The task will not proceed.
- **Defer Work** – The task has been postponed to a future period.

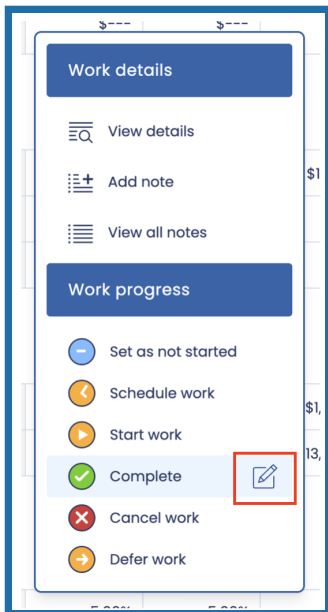
Updating task details

When selecting an action, a **side panel** will open to capture relevant information for that status. For example, selecting **Complete Work** will prompt for:

- **Completion date**
 - **Contractor name**
 - **Optional notes** (e.g. scope changes, remarks, or observations)
 - **Attachments** (e.g. invoices, reports, or photos)
-

Editing existing status

Users can return to any task later to **update or add more details** to its current status — such as additional notes, revised completion dates, or supporting documents.



This ensures the work record remains complete and accurate over time.

Key points

- Available only for **approved years**.
- Enables **end-to-end tracking** of actual maintenance work.
- Supports attachments and notes for complete documentation.
- Keeps a clear history of **task progress and outcomes**.

Work details

The **Work Details** section provides a complete record of each maintenance task’s history and supporting information. It allows users to review **notes, attachments, and progress updates** that have been recorded through the **Work Tracker** feature.

Accessing work details

From the “**Tasks & Costs**” → “**Work Tracker (Actuals)**” view, each task cell for approved years includes a **contextual menu** .

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What you can see

The **Work Details** panel displays:

- **Notes** – All notes that have been added to the task, including updates, observations, or comments recorded during its lifecycle.
 - **Attachments** – All documents and files uploaded for the task, such as invoices, photos, completion certificates, or inspection reports.
 - **Timeline** – A chronological view showing the **history of progress tracking**, including when statuses changed (e.g. *Scheduled, Started, Completed*) and who performed each action.
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Purpose

This view provides full transparency over each task's activity and helps users:

- Review how work has progressed over time.
 - Confirm when and by whom updates were made.
 - Access supporting documentation in one place for audit or reporting purposes.
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Key points

- Available for **approved years** only.
- Shows the **complete audit trail** for each maintenance task.
- Combines **notes, attachments, and a timeline** for a clear overview.
- Ensures accurate and traceable records of maintenance activities.